



# EMPLOYEES MOBILITY BELGIUM REPORT

# CONTEXT AND METHODOLOGY



# KEY THEMES FOR EMPLOYEES MOBILITY



— 1

What are the current practices in terms of employees' mobility?



— 2

What do employees expect from their companies?



— 3

How company mobility offer can become a driver of employee attractiveness?



# METHODOLOGY



DATA COLLECTION METHOD

FIELDWORK PERIOD

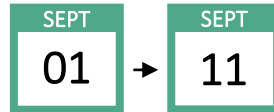
TARGET

QUOTAS

SAMPLE

DURATION OF INTERVIEW

ONLINE QUESTIONNAIRE  
With the Ipsos panel



EMPLOYEES  
in companies with more than  
100 employees in a private  
company

SOCIODEMOGRAPHIC  
CRITERIA (gender,  
age, region)

500 Interviews  
in total

10 minutes  
on average

## READING NOTES ABOUT THE REPORT

Some graphics may not be perfectly equal to 100%. It is due to roundings.

**NETs** are groups of similar answers combined in the stub (ex. NET Interested = very interested + somewhat interested)/

## DEFINITIONS

**Commuting trip** = trip from home to the place of work

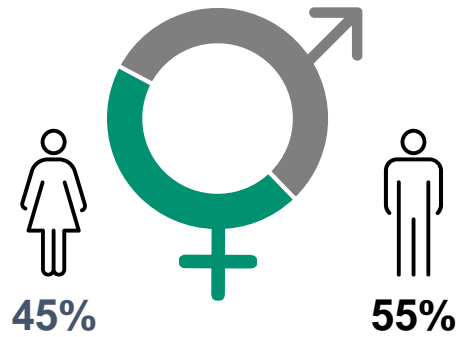
**Business trip** = any trip occurring outside of the typical workplace for the purpose of work : to see a client, go on a seminar, a conference

# SOCIO-DEMOGRAPHIC PROFILE



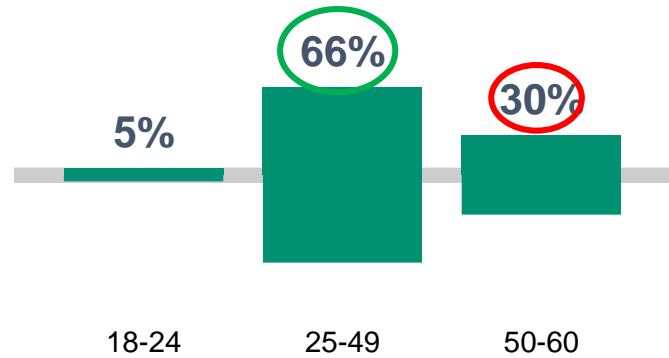
Basis : Total (N=500)

## GENDER



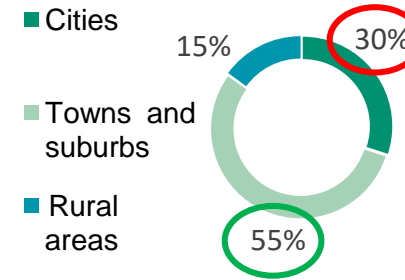
RESP\_GENDER. Are you...?  
Basis: Total

## AGE



YEAR/MONTH. What is your date of birth? Basis: Total

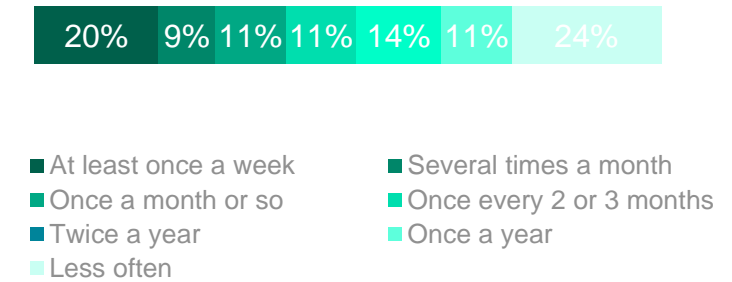
## LIVING AREA



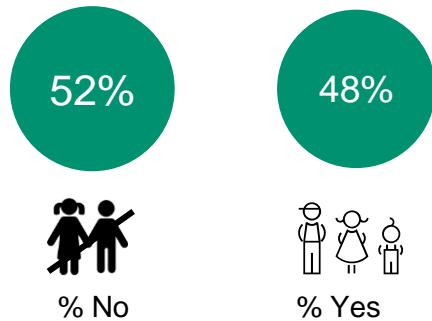
QMktSize. Where do you live? Basis: Total

## BUSINESS TRIP FREQUENCY

At least one business trip (base : 171)

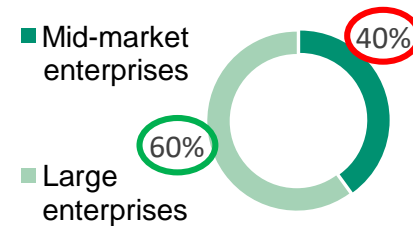


## HOUSEHOLD WITH CHILDREN



KIDS02. How many children under the age of 18 are living in your household? Basis: Total

## COMPANY SIZE



NB\_EMP. How many people are working in your company or organization? Basis: Total

## DOES COMMUTING TRIPS



A9B. What transportation mode(s) do you use most of the time to go from home to your place of work? Basis: Total

## DOES BUSINESS TRIPS

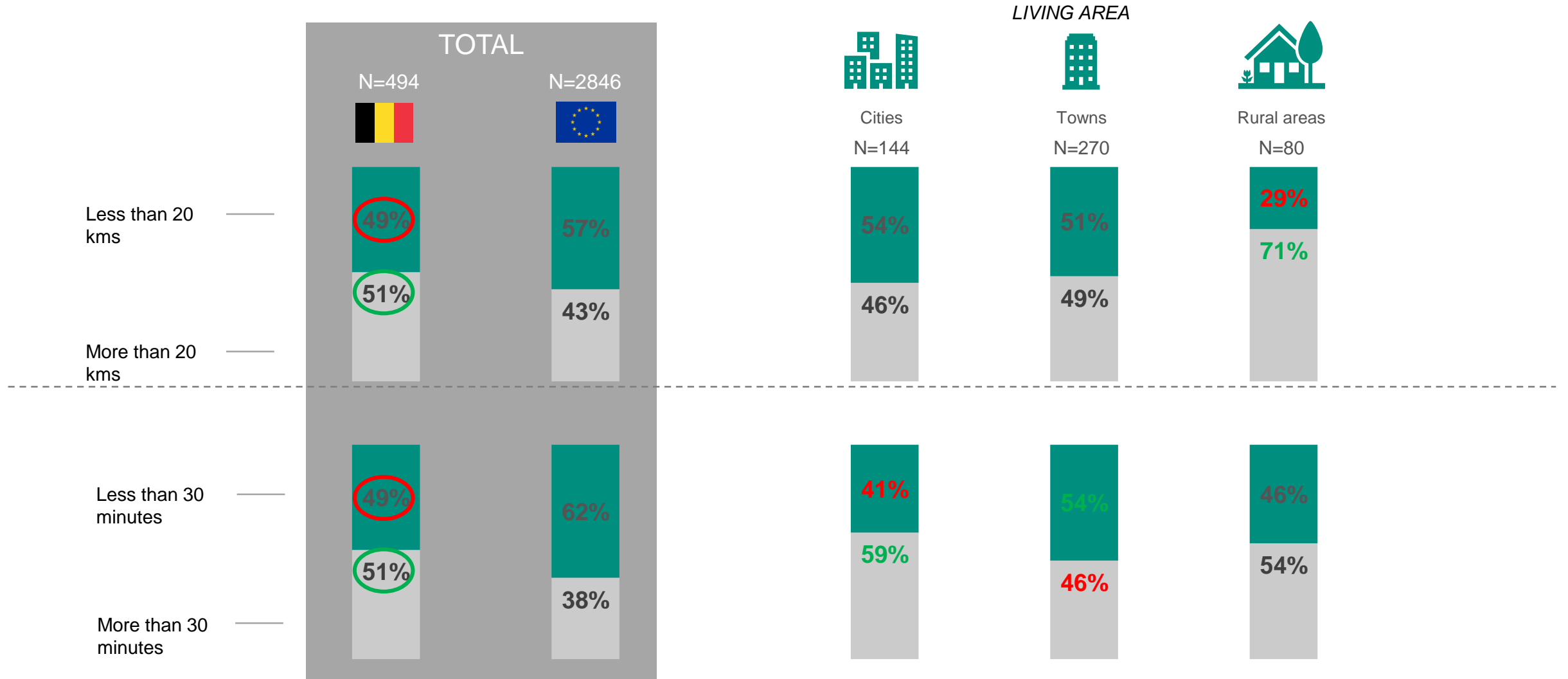


A16. How often do you personally go on business trips? Basis: Total

○ ○ Significantly higher/lower than market average

Commuting time is longer in Belgium than in other European countries, and especially for cities habitants. The commuting distance however is the highest in rural areas.

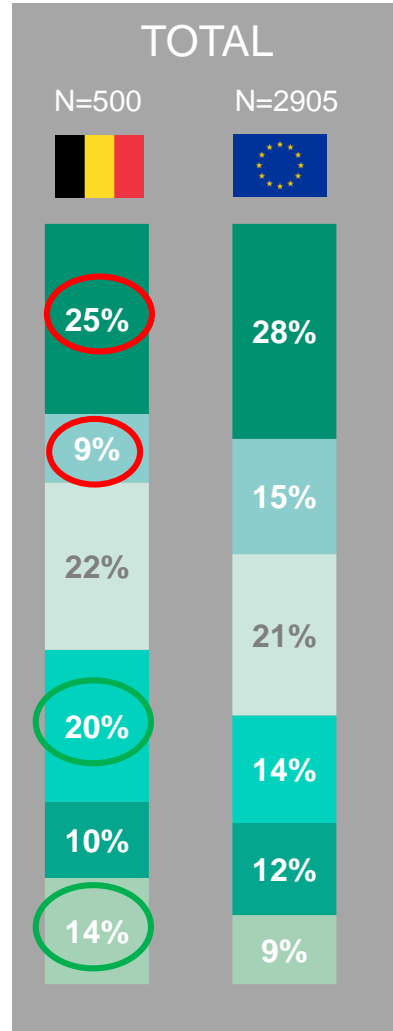
## DISTANCE HOME-WORKPLACE ESTIMATION AND COMMUTING TIME BY LIVING AREA



# A majority of companies in Belgium are situated in less urbanized areas than in Europe.

## COMPANY LOCALISATION BY LIVING AREA

- In the downtown area of a large city
- In the downtown area of a medium-sized city
- On the outskirts of a large city
- On the outskirts of a medium-sized city
- In a small city
- In a rural area



### LIVING AREA



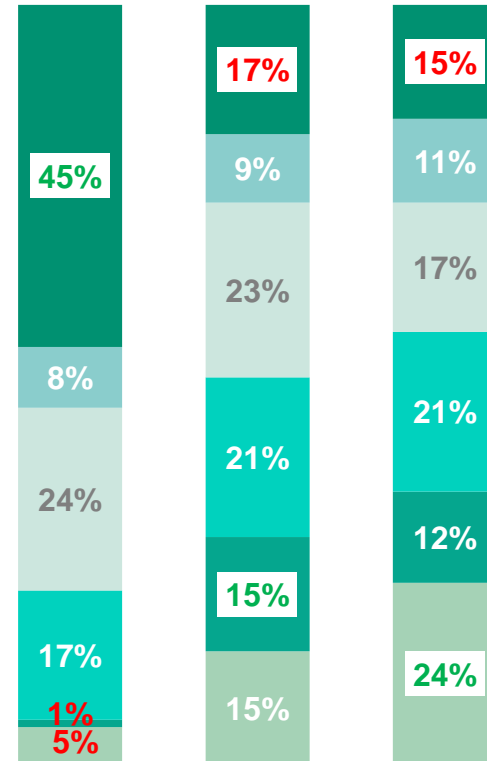
Cities  
N=146



Towns  
N=271



Rural areas  
N=83



○ ○ Significantly higher/lower than market average  
xx%/xx% Significantly higher/lower than total country

A5BIS. Where is your office located?  
Basis: Total

# EXECUTIVE SUMMARY



#1

## The car is still mainly used for both commuting and business journeys...

- In Belgium Covid has changed the remote working habits for a half of employees, which is significantly more than in the other countries (51% vs 47%). On the other hand, the frequency of business trips, our choice of transportation mode and our environmental concerns around mobility have been significantly less impacted than in other countries.
- Although remote working exists (1,6 days per week), it is not in massive, and commuting is still very present. The car remains the dominant transportation mode (68%).
- For business trips, the plane (38%) strongly competes with the company car (23%) and personal car (20%).
- While the main motivations for the choice of commuting transportation mode are speed and comfort, a monetary reason such as company's participation in transportation expenses comes in the 3<sup>rd</sup> position.
- Looking at motivation by type of travel, there are common criteria for the choice of mode for both commuting and business trips. At the same time, comfort is favored for business travel, while price is preferred for commuting.

#2

## An abundant offer generates higher expectations

- In Belgium, the range of mobility services offered by companies is more extensive compared to Europe:
  - Partial coverage of public transportation and fuel expenses, private parking, both diesel and electrified company cars as well as bike leasing.
  - Despite this abundant offer, 38% of the employees don't make use of it.
- Even if there is a higher level of satisfaction with the mobility offer (51% satisfied employees vs. 45% in Europe), **almost half** of the Belgian employees are **not satisfied** with the mobility offer.
- In absolute terms, when choosing a company to work for, the importance given to the mobility services offered by companies is high (70%, 23% of which consider it very important).
- The attractiveness of mobility services depends on the age of the employee : middle-aged people are generally easier to attract (and especially by company cars - 83%) than elder employees.

# MOBILITY AND SUSTAINABILITY : FEATURES THAT COUNT WHEN CHOOSING A FUTURE COMPANY

#3

## A large potential for companies to attract and retain talents through a mobility offer

- Belgians' expectations in terms of development:
  - Transportation modes : bikes, walking, public transportation and company cars
  - Mobility services offered by companies, and particularly contributions to fuel costs (78%) and mobility budgets (73%)
- Belgians are rather optimistic about the development of these services in companies (59% of Belgians think that private companies are about to increase the mobility offer), probably due to the wide range of mobility services already offered by companies
  - Mobility services, and especially **fleets offer and coverage of fuel expenses**, provide private companies with the strong retention and attractiveness driver.

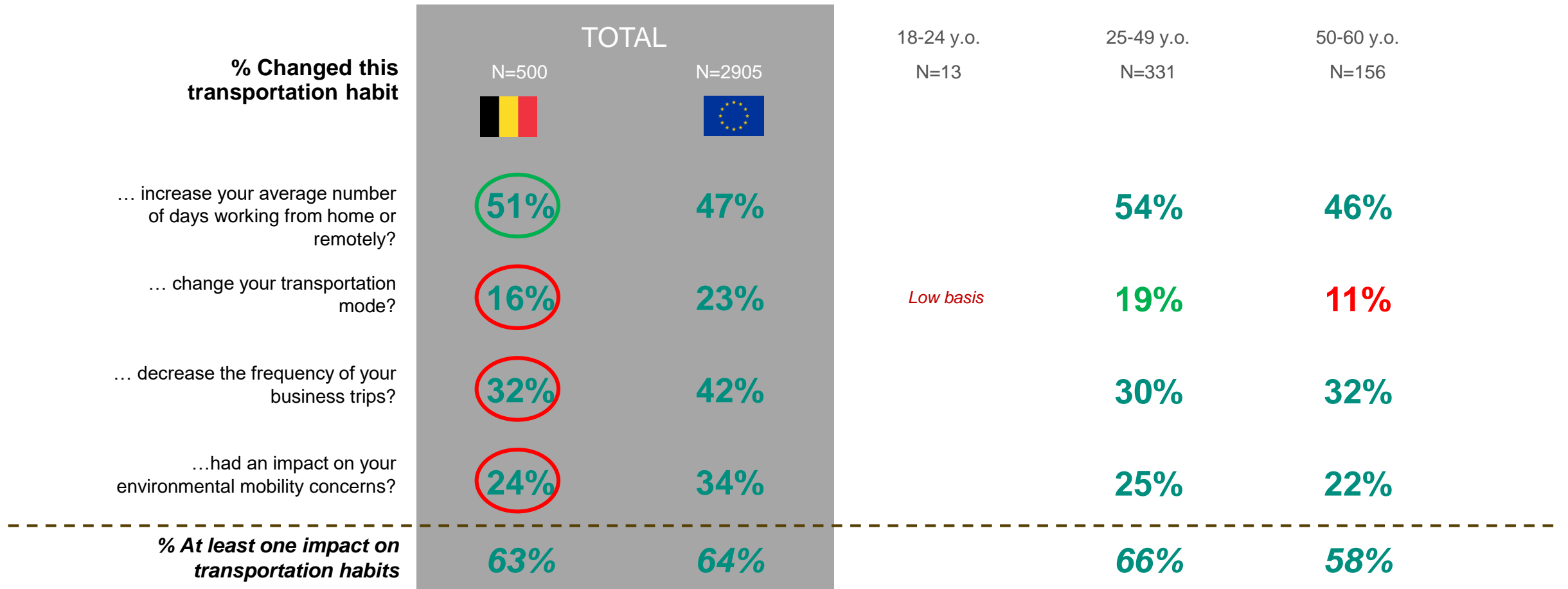
1

*Covid had a significant impact on Belgian's transportation habits, especially among 25-49 y.o.*



Covid has had an impact for a majority of individuals in Belgium (63% have changed habits following the pandemic). The most impacted habit in Belgium was remote working, while the rest of habits, such as business trips frequency and environmental concerns were less impacted compared to Europe.

## COVID IMPACT IN TRANSPORTATION HABITS



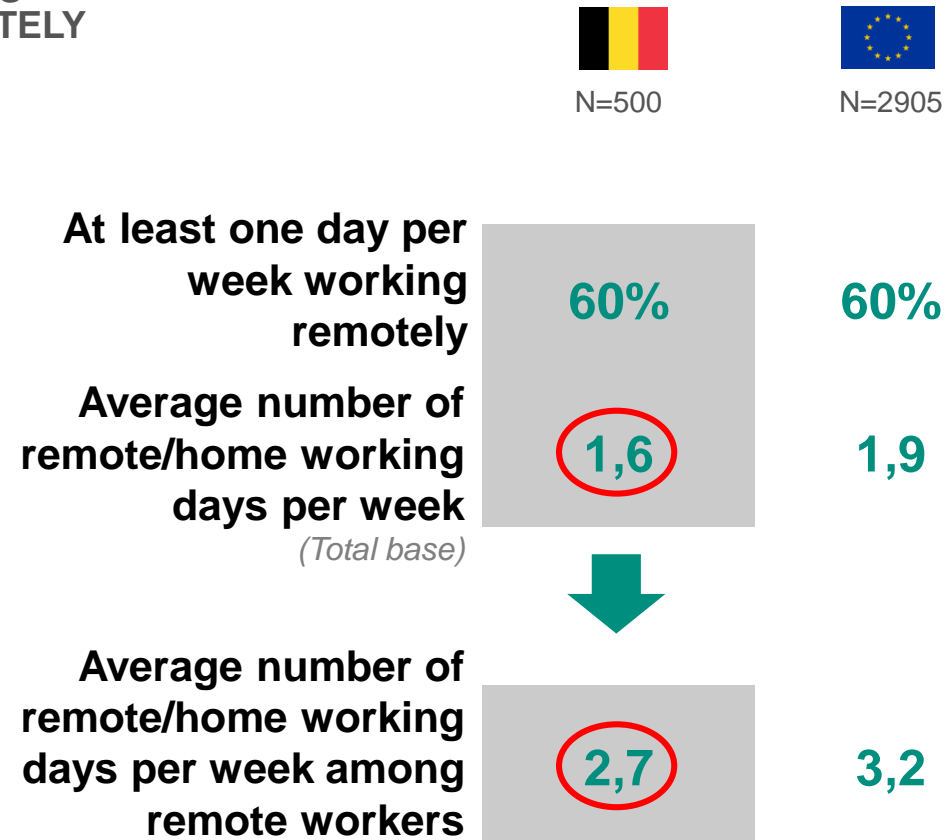
2

*Remote working is less practiced in Belgium. Employees, especially those living in rural areas, are mainly using individual cars for commuting.*



Remote working is a quite wide-spread practice, but still less popular than on-site working (only 1.6 days on average).

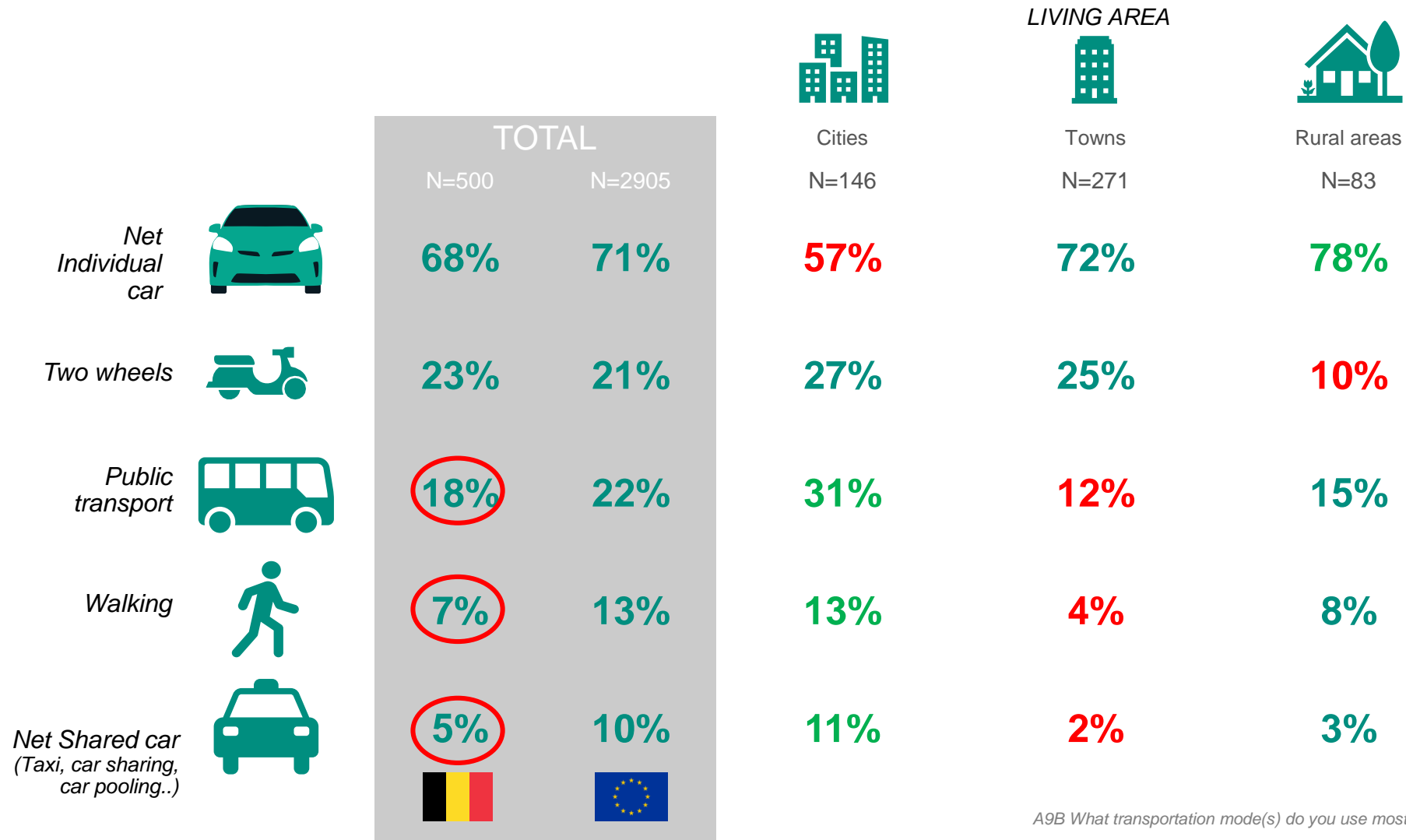
## NUMBER OF DAYS WORKING REMOTELY



A7 How many days per week on average, if any, do you work from home or work remotely?  
Basis: Total

The car is generally preferred in smaller towns or rural areas.

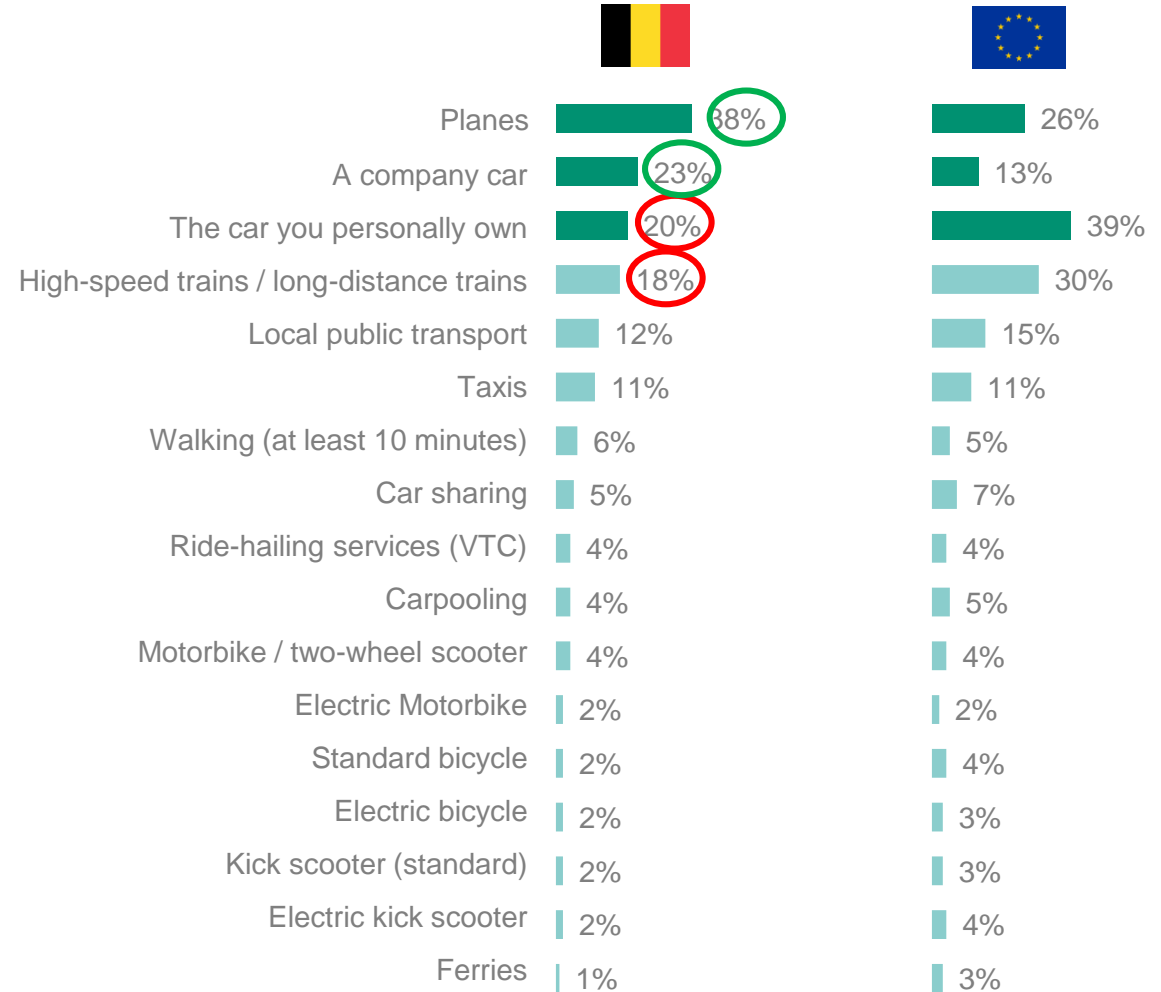
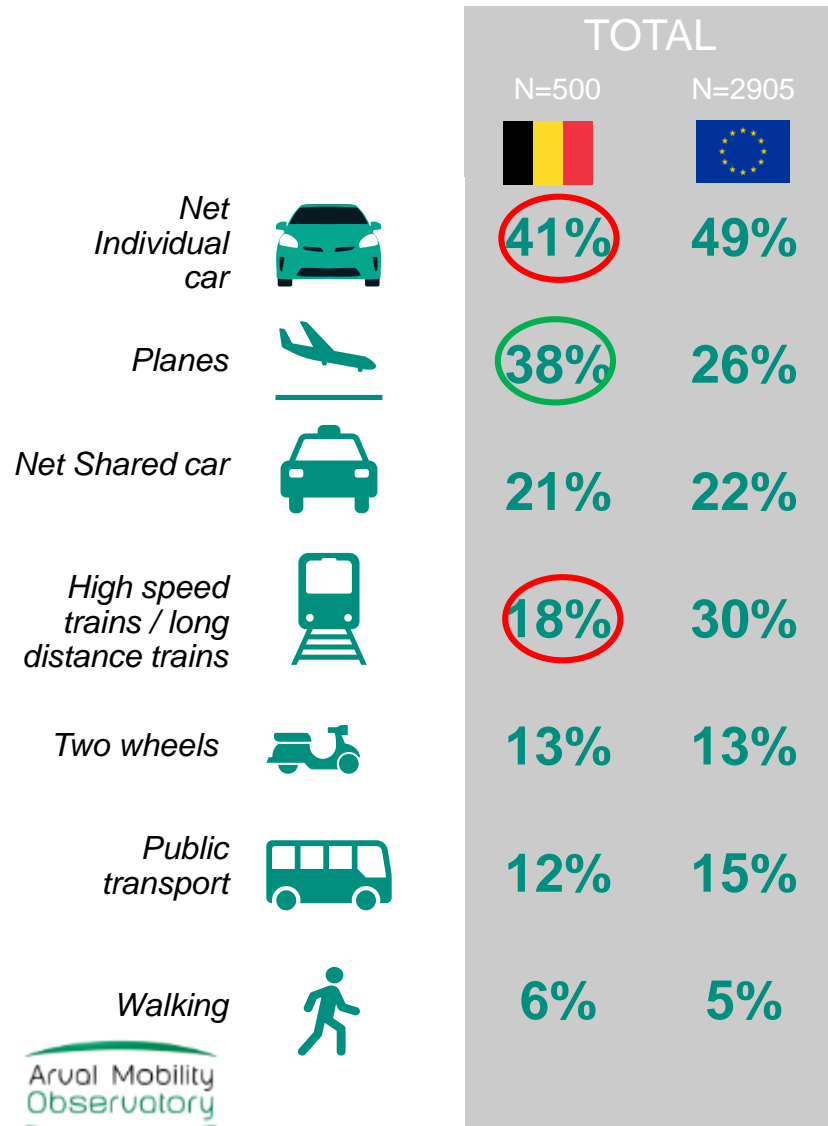
## MOST FREQUENT MODES FOR HOME/WORK TRIPS BY LIVING AREA





A9B What transportation mode(s) do you use most of the time to go from home to your place of work?  
Basis: Total

For business travel, planes are largely preferred by Belgians, while a personally owned car is almost 2 times less used than in other European countries.

## MOST FREQUENT MODES FOR BUSINESS TRIPS



  Significantly higher/lower than market average  
 xx%/xx% Significantly higher/lower than total country

A17A What transportation mode(s) do you use most of the time when going on business trips?  
 Basis: Go on business trips



3

*Speed, comfort and coverage of expenses by company are the main motivations for the transportation modes choice.*



While two dominating criteria of **commute transportation** mode choice in Belgium are the same as in other European countries, the coverage of transportation expenses by the company is in 3<sup>rd</sup> position.

## TOP 5 MOTIVATIONS FOR COMMUTING TRANSPORTATION MODES

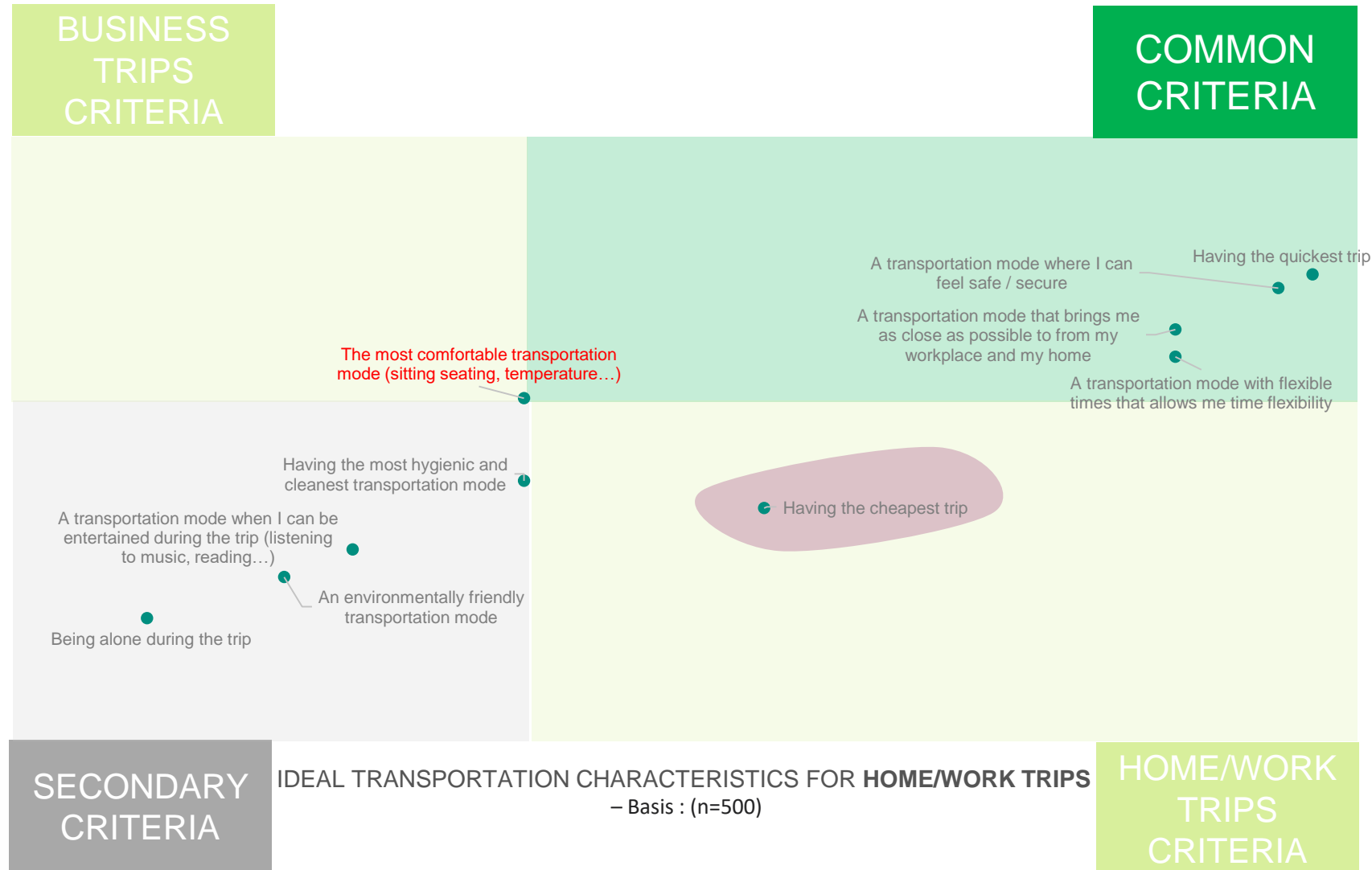
	TOTAL	
	N=494 	N=2846 
#1	The quickest trip <b>42%</b>	The quickest trip <b>38%</b>
#2	The trip is more comfortable <b>28%</b>	The trip is more comfortable <b>29%</b>
#3	My company is paying for it <b>27%</b>	It's easy to access it from home and work <b>26%</b>
#4	It's easy to access it from home and work <b>25%</b>	I can be flexible with my hours <b>23%</b>
#5	It's the most direct trip <b>22%</b>	There is no other transportation option <b>20%</b>

For Belgians as well as for Europeans, there is a consensus on the ideal characteristics of the modes for both commuting and business trips : speed, proximity, flexibility and safety. Comfort is favored for business travel, while price is preferred for commuting.

## IDEAL TRANSPORTATION CHARACTERISTICS ACCORDING THE JOURNEY TYPE : MAPPING



IDEAL TRANSPORTATION CHARACTERISTICS FOR BUSINESS TRIPS – Basis (n=500)



B5A. How important would the following criteria be if you had to choose a transportation mode from your workplace to your home?  
 B5C. How important would the following criteria be if you had to choose a transportation mode for your business trips?

4

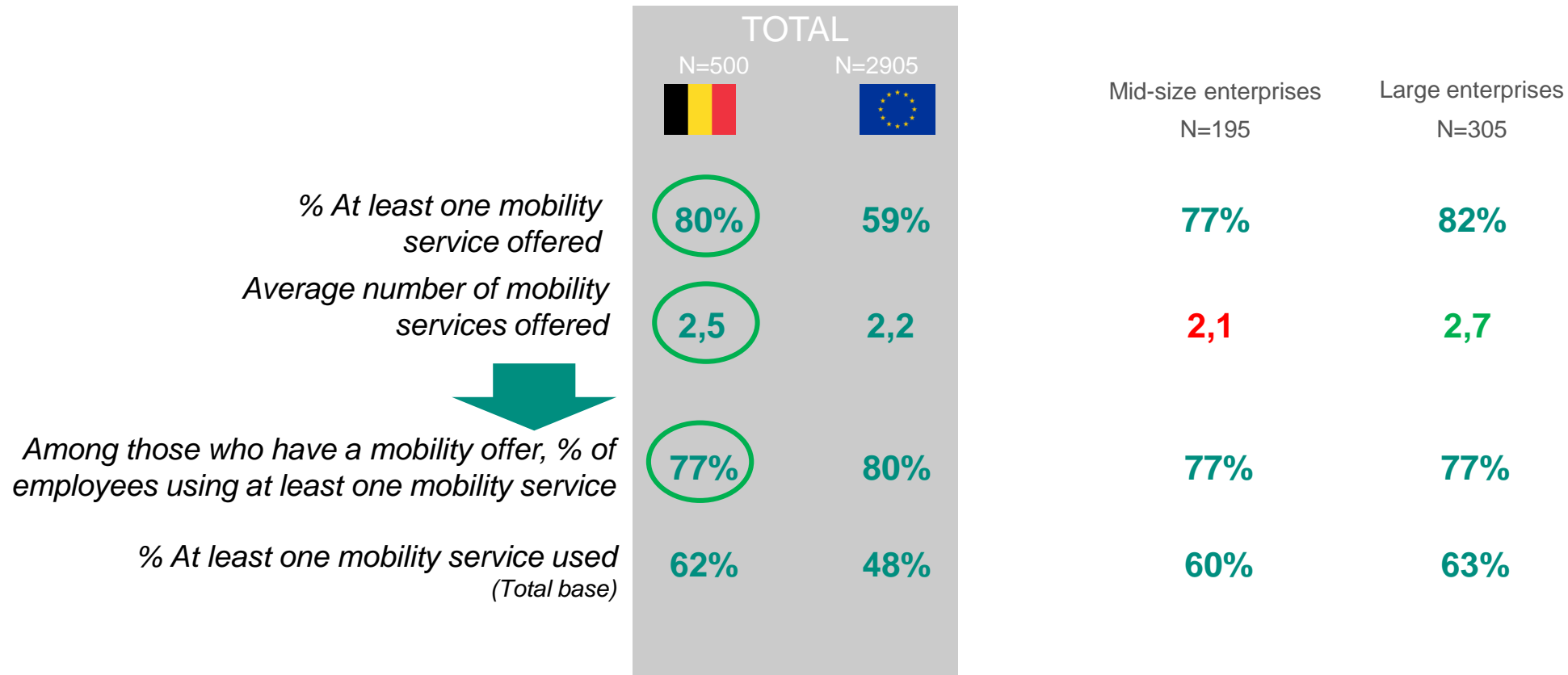
*In Belgium there is an extensive mobility offer made by companies to their employees.*



In Belgium the mobility offer is the most developed: 4 out of 5 Belgians have at least one mobility service offered by their employer, and more than half personally use at least one of the mobility services offered.

The number of services offered is higher in larger companies (almost 3 mobility modes offered on average).

## CURRENT MOBILITY SERVICES OFFER



The mobility offer is abundant in Belgium. Almost a quarter of the companies offers bike leasing (30% of large companies). Nevertheless, when bike leasing is offered, only 1 out of 4 employees is really using it.

CURRENT MOBILITY SERVICES OFFER

■ Personally used □ Offered by company



N=500

N=2905

Mid-market enterprises

N=195

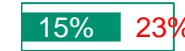
Large enterprises

N=305

Partial coverage of public transportation expenses



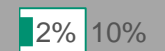
Private parking space provided by the company



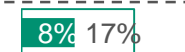
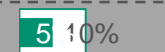
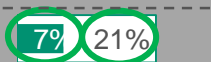
Diesel or petrol company cars



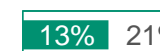
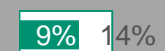
Bike leasing



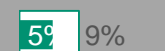
Electrified company cars



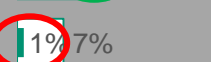
Partial coverage of energy fuel expenses



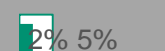
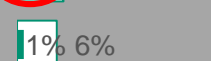
A mobility budget



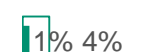
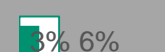
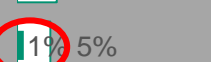
Car sharing



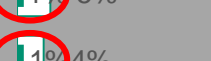
Bike sharing



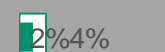
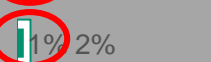
Short-term rental cars



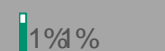
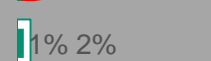
An application provided by the company to book multiple mobility solutions



Scooter and moto leasing



Other service or solution



% At least one mobility service used



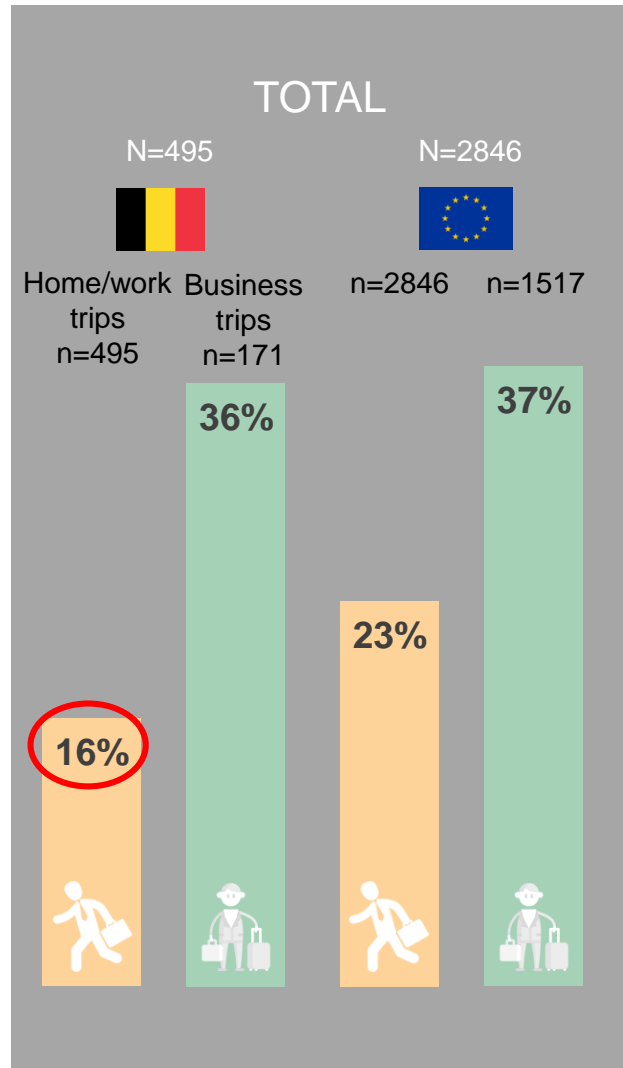
48%

60%

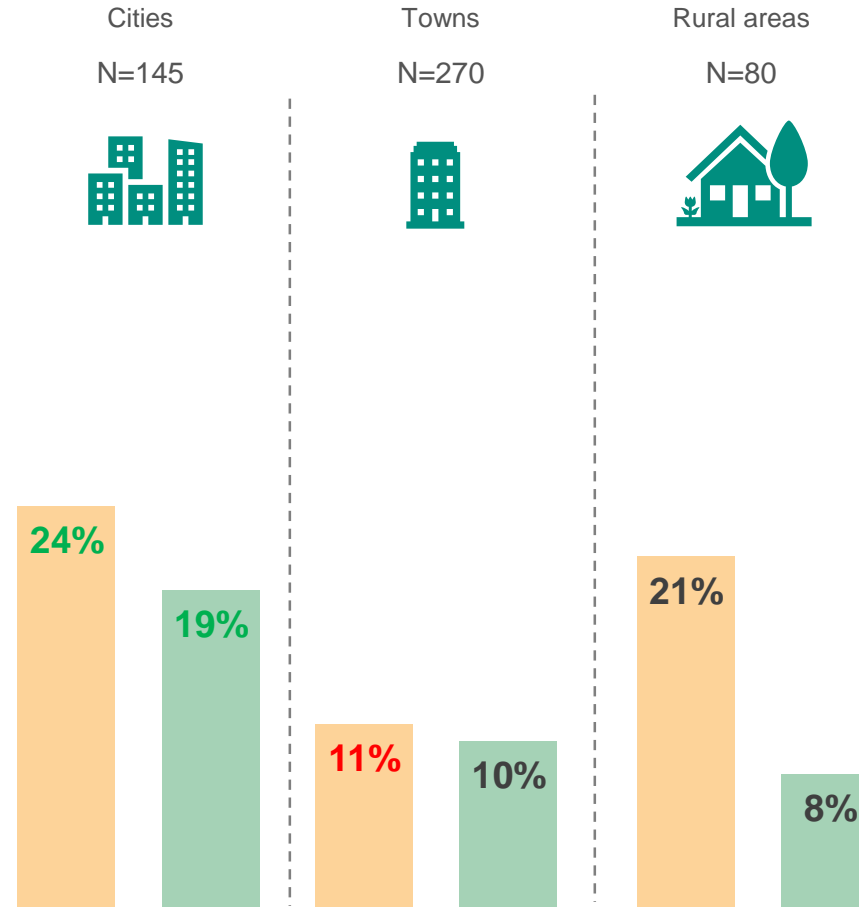
63%

Belgians are using a MAAS application less often than Europeans. It is rarely used by towns habitants, but rather popular among cities and rural areas habitants, especially for commuting trips.

## APPLICATION USE AMONG EACH TYPE OF TRIP



## LIVING AREA



5

*The level of employees' satisfaction with the mobility offer is higher in Belgium than in Europe. Still only half of the employees are satisfied.*



Satisfaction with the mobility offer proposed by the company is higher in Belgium than in Europe on average : half of employees are satisfied with the current offer.

## SATISFACTION TOWARDS THE CURRENT MOBILITY OFFER



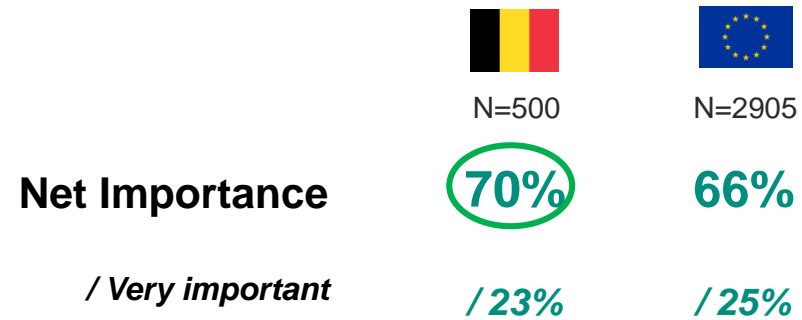
6

*The mobility offer is an important factor for employees in their employer choice.*



Almost a quarter of the employed Belgians attach great importance to the mobility services offered by a company to work for.

## IMPORTANCE OF THE MOBILITY SOLUTIONS OFFERED BY A COMPANY TO WORK FOR



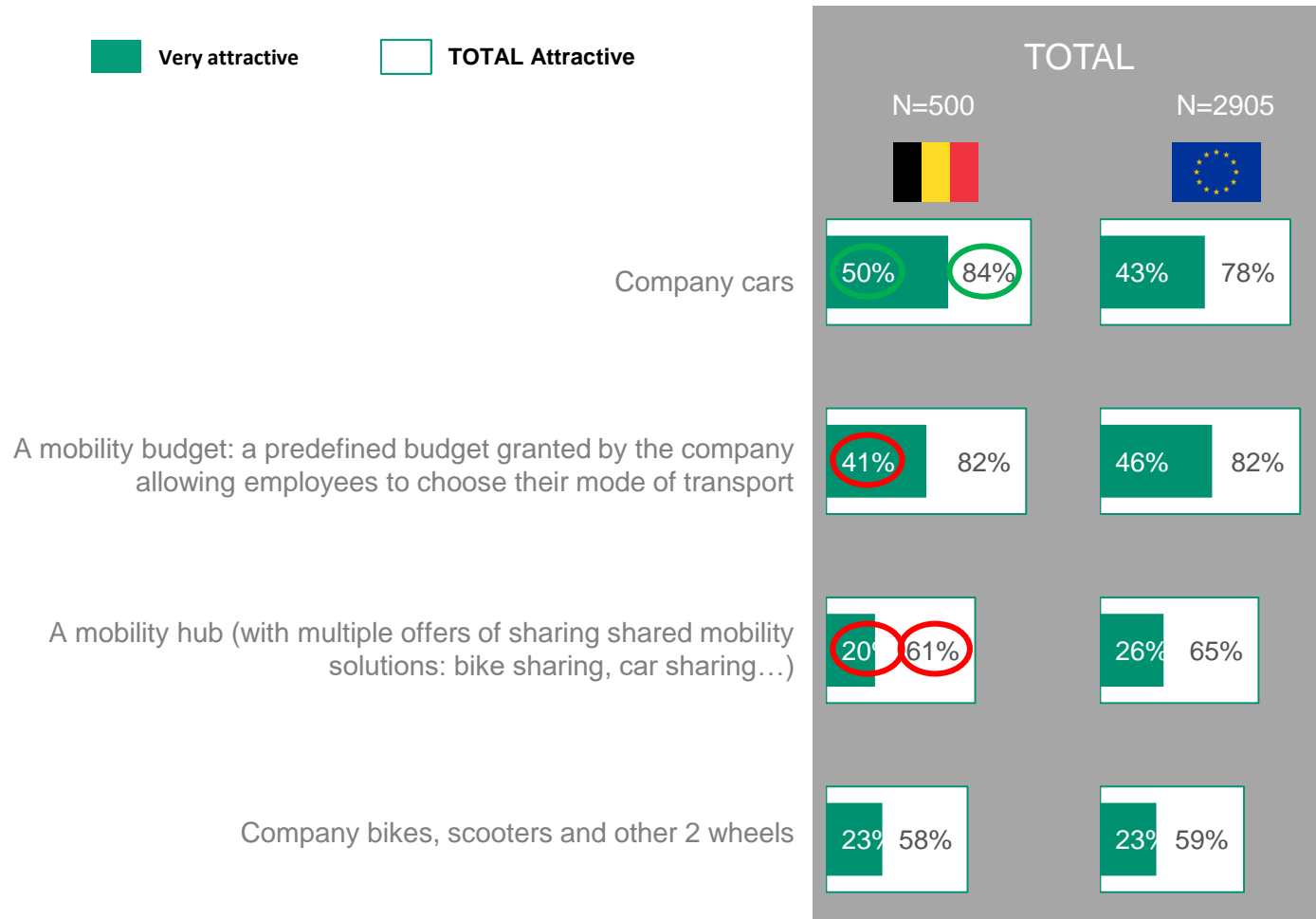
7

*The company car is a clear driver for employer attractiveness.*



The company car is particularly welcomed by Belgians. All mobility offers, and especially, company cars and two-wheels are more attractive to middle-aged than to elder workers.

## IMPACT OF MOBILITY ON COMPANY CHOICE



B10. How attractive would a company be if it proposed the following mobility benefits on a new job opening? Please note that this new job offer would have similar conditions in terms of duties and compensation than your current job.

Basis : Total

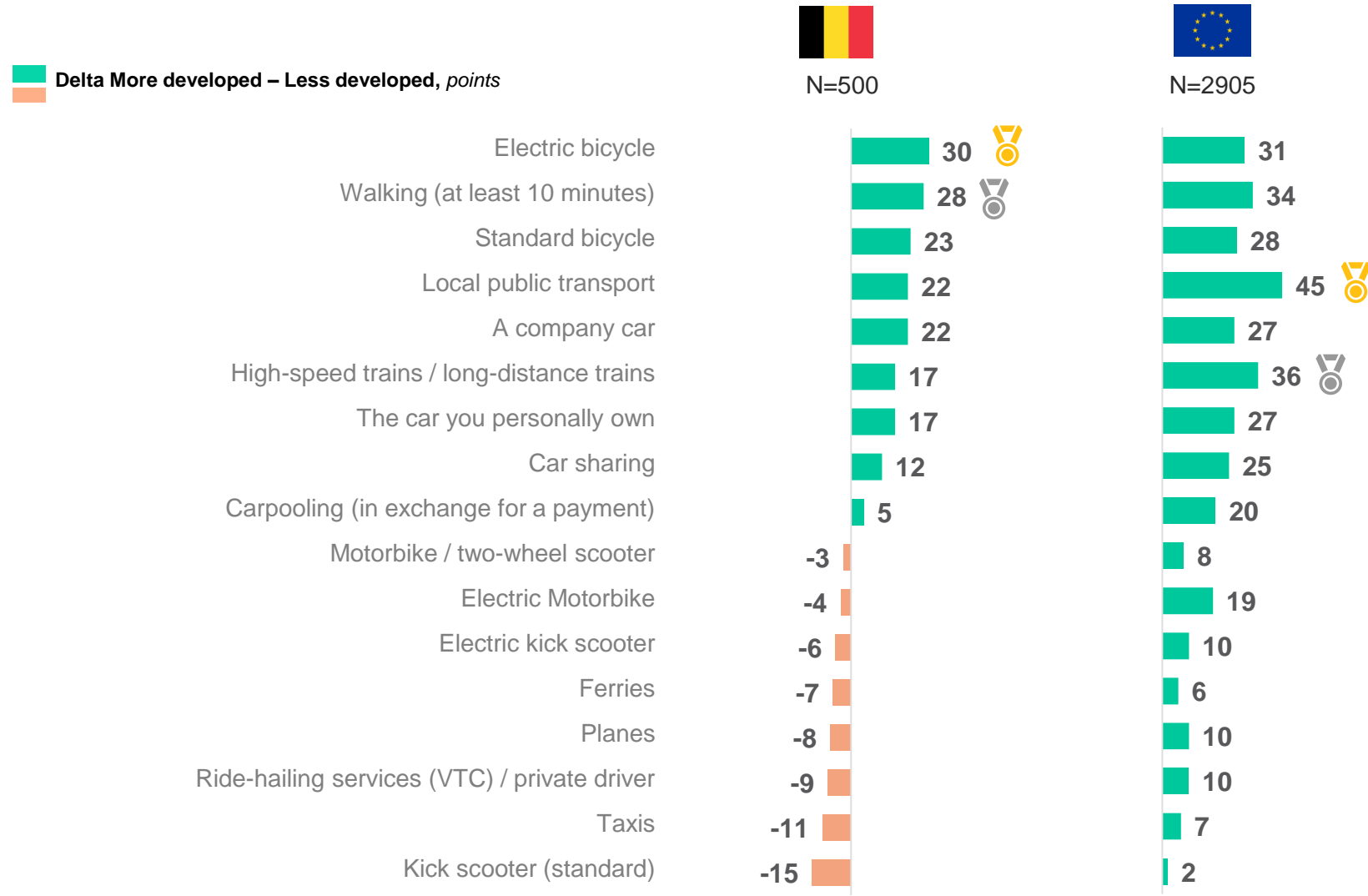
8

*Expectations in terms of development of employers' mobility offer express Belgians' environmental concerns.*



Belgians, compared to Europeans in general, believe that the future of transportation belongs to bikes and walking. At the same time they consider that some of the high carbon-emitting transportation modes will be less developed in the future.

## TRANSPORTATION MODE DEVELOPMENT IN THE FUTURE ACCORDING TO EMPLOYEES

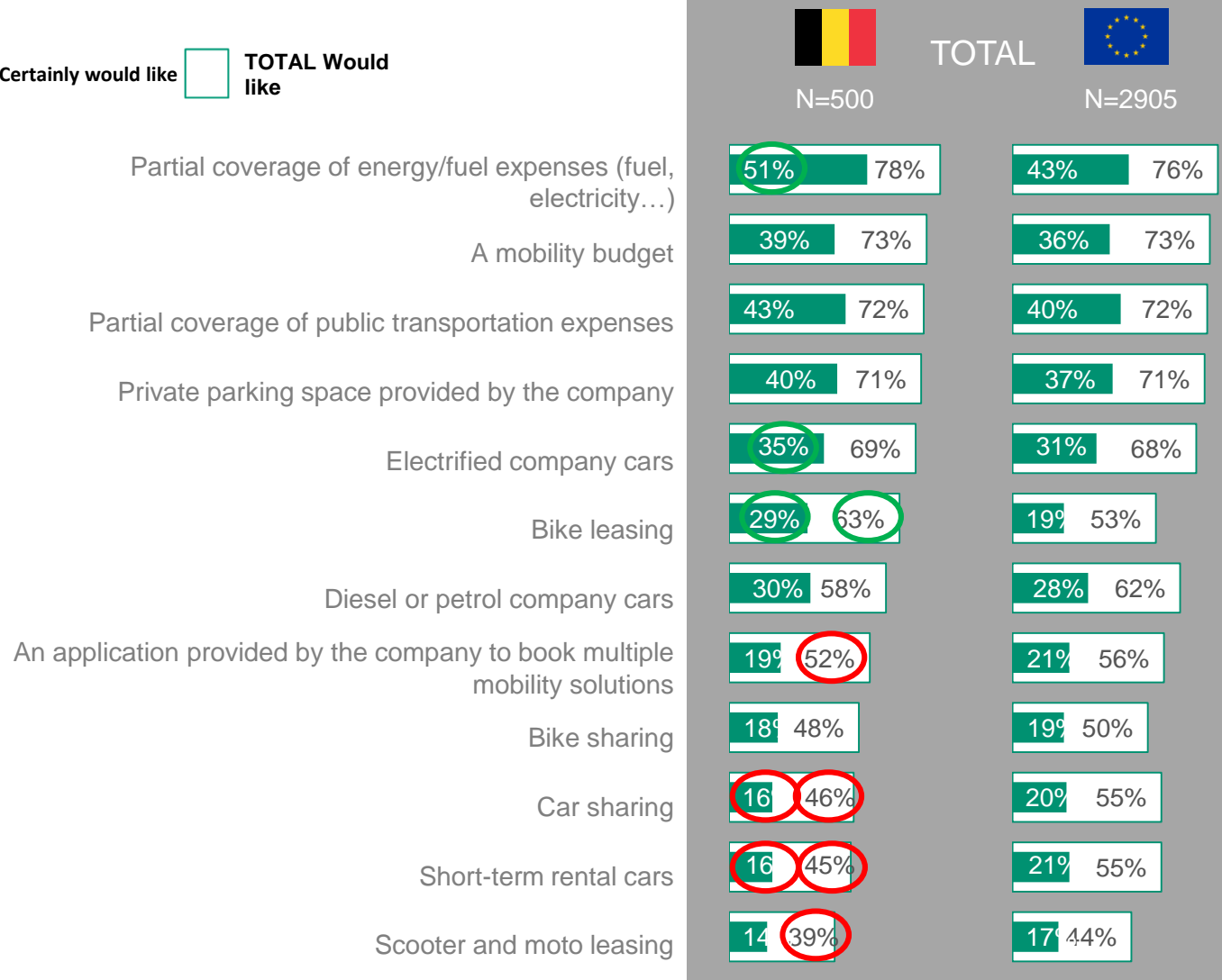


B6. In the next few years, what transportation mode would you like to see being developed and, on the contrary, which one would you see being less used for your mobility for your home-work trips or business trips?  
Basis : Total

Generally speaking, Belgians have greater expectations towards mobility offer than Europeans ; particularly regarding fuel expenses coverage, electrified cars and bike leasing.

## MOBILITY SERVICES OFFERS TO BE DEVELOPED OR TO BE MAINTAINED IN THE COMPANY

 Certainly would like  TOTAL Would like



% Would like at least one mobility service to be provided **91%**

**92%**

9

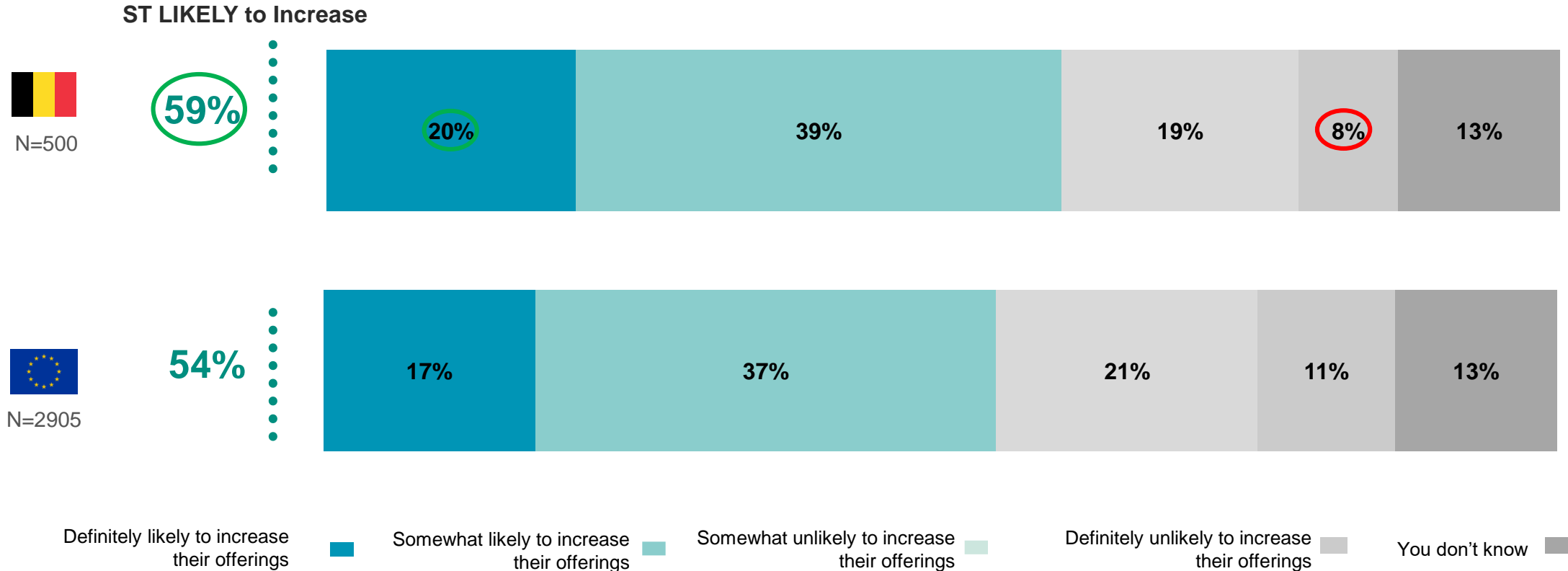
*Belgians have a rather optimistic view on the development of mobility services in private companies.*



Belgians are more optimistic about future mobility offer from private companies : 3 out of 5 share the conviction that offer is likely to increase.



## LIKELIHOOD TO CHANGE PRIVATE COMPANIES MOBILITY OFFER





Thank you

